

MONEY MEMORIES



Name _____

Date _____

Directions: Retirement signals a major life transition. To realize the potential of this stage in your life, it is important to spend time reflecting on the challenges and opportunities that lie ahead. To stimulate your thinking about this important topic, please respond to the following questions:

1. What is your earliest money memory?

2. As a child, what was the most important lesson you learned about money?

3. Growing up in your family, was money mainly used to reward, punish, survive, impress, control, help others, have fun, buy love, reach goals, or _____?

4. What are the one sentence messages regarding money that have stuck with you from your childhood? Where did you hear these messages?

5. What were the spending/saving patterns of your mother? Of your father?

6. Describe the work ethic of your mother and your father.



1500 Town Plaza Court | Winter Springs, FL 32708 | MOZAIC-WEALTH.COM

Where **Money** Intersects **Life**

ph 407.622.7526
fax 866.386.7525

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7. When you were young, did you consider your family to be rich, poor, or _____?

8. What were you taught about money when you were growing up?

9. In your family, was money an “issue”? A source of conflict? A tool for achieving goals?

10. When did you first start earning your own spending money?

11. What was your first big purchase? How did that make you feel?

12. As an adult, what has been the most important lesson you have learned about money?



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13. In your current financial life, are you more of a spender or a saver?

14. In your current financial life, are you more of an avoider or a worrier?

15. In your heart of hearts, what have you wanted money to give you?

16. Has money been an “issue” or source of conflict in your important relationships?

17. What money habits have brought you closer to your life goals?

18. What money habits have been obstacles to reaching your life goals?



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19. What or who has most influenced your financial philosophy? How and why?

20. What experience do you feel has most directly shaped your current level of financial satisfaction?



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